

CITY OF LEBANON
DIVISION OF TAXATION
50 S. BROADWAY
LEBANON, OH 45036-1777
TEL: (513) 933-7205
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www.lebanonohio.gov

FORM IR



2011

INCOME TAX RETURN FOR THE CALENDAR YEAR 2011
DUE ON OR BEFORE APRIL 17, 2012
FILING IS REQUIRED EVEN IF YOU HAVE NO INCOME AND NO TAX IS DUE

CHECK THE APPROPRIATE BOX

- ☐ FULL YEAR RESIDENT
☐ PART YEAR RESIDENT
DATES: FROM _____ TO _____
☐ NON RESIDENT
☐ RETIRED, NO TAXABLE INCOME

CHECK FILING STATUS

- ☐ SINGLE
☐ MARRIED

SOCIAL SECURITY NUMBER	SPOUSE'S SOCIAL SECURITY NUMBER
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NAME AND ADDRESS

CHARGE CARD INFORMATION

☐ VISA ☐ MASTERCARD
Card # (16 digits) _____
Exp. Date _____
Total Amount Authorized \$ _____
Signature _____
Daytime Phone # (_____) _____

To complete using online tool go to:
lebanoncitytax.com

PART A TAX CALCULATION – USE ONLINE CALCULATION TOOL – SEE BOX ABOVE		FOR OFFICE USE ONLY
1. Total Qualifying Wages (Usually Box 5) (Attach All W-2 Forms)	\$ _____	\$ _____
2a. Other Taxable Income from Line 19, Page 2 – See Instructions.	\$ _____	\$ _____
2b. Deductions from line 21	\$ _____	\$ _____
3. Taxable Income: Line 1 Plus 2a Minus Line 2b	\$ _____	\$ _____
4. Lebanon Tax: 1% of Line 3	\$ _____	\$ _____
5 CREDITS		
5a. Lebanon Tax Withheld Per W-2's	\$ _____	
5b. 2011 Estimated Tax Paid to Lebanon	\$ _____	
5c. 2011 Tax Paid Municipality of _____ (Not to exceed 1% of portion taxed per W-2 – See Instructions).	\$ _____	
5d. Prior Year Overpayments	\$ _____	
5e. Total Credits (Add Lines 5a through 5d and Enter Here)	\$ _____	\$ _____
6. If Line 4 is Greater Than Line 5e, Payment of Balance Must Accompany This Return PENALTY \$ _____ INTEREST \$ _____ LATE FILING FEE \$25.00 TAX DUE	\$ _____	\$ _____
7. Overpayment Refunded \$ _____ or Credited \$ _____ to Next Year's Estimate (Line 5e Greater Than Line 4) . .	\$ _____	\$ _____
No Tax, Refund or Credit of Less than \$5.00 Shall Be Collected, Refunded or Credited.		
PART B DECLARATION OF ESTIMATED TAX FOR 2012 <small>THIS SECTION IS REQUIRED TO BE COMPLETED IF NO LOCAL TAX IS WITHHELD. FAILURE TO PAY 90% OF YOUR 2012 ESTIMATED TAX DUE BY JANUARY 15, 2013 WILL RESULT IN A PENALTY.</small>		
8. Total estimated income subject to tax	\$ _____	\$ _____
9. Lebanon Income Tax Declared (Multiply Line 8 by 1%)	\$ _____	\$ _____
10. Tax Withheld from Wages.	\$ _____	\$ _____
11. Tax due after Withholding (Line 9 less Line 10) STOP if this amount is less than \$0.00	\$ _____	\$ _____
12. Declaration Due (25% of Line 11)	\$ _____	\$ _____
13. Less credits (from Line 7 above)	\$ _____	\$ _____
14. Net estimated tax due if Line 12 minus Line 13 is greater than zero*	\$ _____	\$ _____
*Subsequent estimated payments are due by the 15th of July, October and January. COUPONS AVAILABLE ONLINE www.lebanonohio.gov		
15. TOTAL AMOUNT DUE – Combine Line 6 above with Line 14 (Make check payable to the Lebanon Tax Department) \$ _____ \$ _____		

- ☐ I CERTIFY I HAVE EXAMINED THIS RETURN, INCLUDING ACCOMPANYING SCHEDULES AND STATEMENTS, AND TO THE BEST OF MY KNOWLEDGE AND BELIEF IS TRUE, CORRECT AND COMPLETE, AND THE FIGURES USED HEREIN ARE THE SAME AS USED FOR FEDERAL INCOME TAX PURPOSES, (WITH THE EXCEPTION THAT DEFERRED INCOME MUST BE REPORTED FOR CITY INCOME TAX PURPOSES). IF RETURN NOT SIGNED, THIS IS NOT A LEGAL FINAL RETURN. TAXPAYER AND SPOUSE MUST SIGN, EVEN IF ONLY ONE HAS INCOME.
- ☐ CHECK BOX IF WE MAY DISCUSS THIS RETURN WITH YOUR PREPARER.

Signature of Taxpayer or Agent			Preferred E-Mail Address		
Date	Phone		Preparer's Signature		
			Date		
Signature of Spouse			Preparer's Address		
Date	Phone		Phone		

**TO BE COMPLETED ONLY BY THOSE WHO HAVE TAXABLE INCOME OTHER THAN WAGES OR
WHO CLAIM EXPENSES AS A DEDUCTION FROM SUCH WAGES.**

16. NET PROFIT (LOSS) FROM BUSINESS (**ATTACH FEDERAL SCHEDULE C**) \$ _____
17. RENTAL INCOME (**ATTACH FEDERAL SCHEDULE E**) \$ _____
18. OTHER INCOME (**ATTACH FEDERAL FORMS & SCHEDULES**)
- (A) Schedule K-1 Income (**ATTACH K-1 AND SCHEDULE E**) \$ _____
- (B) Miscellaneous Income – 1099-MISC not reported above, (Attach Documentation) \$ _____
- (C) Schedule F – Farm Income \$ _____
- (D) Gambling and Lottery Winnings \$ _____
- (E) Total of A-D \$ _____
19. TOTAL OTHER INCOME combine 16, 17 and 18E. CARRY POSITIVE NUMBER TO LINE 2A (LOSSES DO NOT CARRY FORWARD) .. \$ _____
- Net loss from a business activity cannot be used to offset wage earnings.**
- No Loss Carryover Allowed From Prior Years Effective Tax Year 2007.**
20. DEDUCTIONS (**only complete this section if you had allowable Federal Form 2106 deductions or you were a part year resident**)
- (A) Employee business expenses from Lebanon or Township wages only. (**ATTACH FORM 2106**) \$ _____
- (B) LESS 2% FEDERAL AGI LIMITATION (**ATTACH SCHEDULE A**) \$ _____
- (C) Line A minus B (**IF ZERO ON LINE A ENTER ZERO**) \$ _____
- (D) Part year residents income exclusion (**ATTACH EXPLANATION**) \$ _____
21. Total of deductions add lines C and D and carry result to Line 2B. \$ _____

EXAMPLES OF DEDUCTIONS THAT ARE NOT ALLOWED:

Contribution to individual Retirement Account (IRA); Simplified Employee Pension (SEP) plan; Keogh (H.R. 10) Retirement Plan; 401-K.

INCOME NOT TAXED BY THE CITY OF LEBANON:

Unemployment, Interest, Dividends, Capital Gains, Military wages of service member and Distributions from pension or retirement plans.

EXTENSION POLICY

If filing date cannot be met, a written request for extension must be forwarded to this office on or before the filing date. Failure to do so can result in assessment of penalty and interest charges. **PAY TENTATIVE TAX DUE WITH EXTENSION REQUEST.**

NOTE: UNLESS ACCOMPANIED BY PAYMENT OF THE BALANCE OF THE TAX DECLARED DUE AND AT LEAST ONE FOURTH OF THE ESTIMATED TAX, THIS FORM IS NOT A LEGAL FINAL RETURN OR DECLARATION.

2012 DECLARATION AND RETURN PAYMENT CALENDAR

APRIL 17, 2012
File 2011 Return
File 2012 Declaration
with 1st quarterly payment

JULY 15, 2012
Make 2nd
quarterly payment

OCTOBER 15, 2012
Make 3rd
quarterly payment

JANUARY 15, 2013
Make 4th
quarterly payment

Estimated Tax Coupons are available online at www.lebanonohio.gov

ONLINE PREPARATION TOOL FOR 2011 TAX RETURNS.

The City of Lebanon Tax Department is offering, free of charge, an online tool to complete your 2011 city tax return. Enter your Generic URL address found on page 1.

Follow the step by step instructions on the screen to complete your return. Print the completed return, attach all W-2's and any other Federal Schedules and Forms shown on your return. Mail return and paperwork in the envelope provided by April 17, 2012.

In order to receive the 2012 tax forms electronically, provide your e-mail address when logging on to our tax tool.

Should you need assistance, please contact the Tax Department.